

For Six Month Period Ending

8 JUL 1993

(Insert date)

Name of Registrant

✓ New Zealand Meat Producers Board

Registration No. 2526

Business Address of Registrant

✓ 1110 N Glebe Rd
Suite 580
Arlington VA 22201

I-REGISTRANT

1. Has there been a change in the information previously furnished in connection with the following:

(a) If an individual:

- | | | |
|-----------------------|------------------------------|-----------------------------|
| (1) Residence address | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| (2) Citizenship | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| (3) Occupation | Yes <input type="checkbox"/> | No <input type="checkbox"/> |

(b) If an organization:

- | | | |
|--------------------------|------------------------------|--|
| (1) Name | Yes <input type="checkbox"/> | No <input checked="" type="checkbox"/> |
| (2) Ownership or control | Yes <input type="checkbox"/> | No <input checked="" type="checkbox"/> |
| (3) Branch offices | Yes <input type="checkbox"/> | No <input checked="" type="checkbox"/> |

2. Explain fully all changes, if any, indicated in item 1.

IF THE REGISTRANT IS AN INDIVIDUAL, OMIT RESPONSE TO ITEMS 3, 4, and 5.

3. Have any persons ceased acting as partners, officers, directors or similar officials of the registrant during this 6 month reporting period? Yes ☐ No ☒

If yes, furnish the following information:

Name

Position

Date Connection

Ended

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4. Have any persons become partners, officers, directors or similar officials during this 6 month reporting period?
 Yes ☐ No ☒

If yes, furnish the following information:

<i>Name</i>	<i>Residence Address</i>	<i>Citizenship</i>	<i>Position</i>	<i>Date Assumed</i>
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5. Has any person named in Item 4 rendered services directly in furtherance of the interests of any foreign principal?
 Yes ☐ No ☒

If yes, identify each such person and describe his services.

6. Have any employees or individuals other than officials, who have filed a short form registration statement, terminated their employment or connection with the registrant during this 6 month reporting period? Yes ☐ No ☒

If yes, furnish the following information:

<i>Name</i>	<i>Position or connection</i>	<i>Date terminated</i>
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7. During this 6 month reporting period, have any persons been hired as employees or in any other capacity by the registrant who rendered services to the registrant directly in furtherance of the interests of any foreign principal in other than a clerical or secretarial, or in a related or similar capacity? Yes ☐ No ☒

If yes, furnish the following information:

<i>Name</i>	<i>Residence Address</i>	<i>Position or connection</i>	<i>Date connection began</i>
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II—FOREIGN PRINCIPAL

(PAGE 3)

8. Has your connection with any foreign principal ended during this 6 month reporting period?

Yes ☐

No ☒

If yes, furnish the following information:

Name of foreign principal

Date of Termination

9. Have you acquired any new foreign principal¹ during this 6 month reporting period?

Yes ☐

No ☒

If yes, furnish following information:

Name and address of foreign principal

Date acquired

10. In addition to those named in Items 8 and 9, if any, list the foreign principals¹ whom you continued to represent during the 6 month reporting period.

✓ *New Zealand Meat Producers Board*

III—ACTIVITIES

11. During this 6 month reporting period, have you engaged in any activities for or rendered any services to any foreign principal named in Items 8, 9, and 10 of this statement? Yes ☒ No ☐

If yes, identify each such foreign principal and describe in full detail your activities and services:

New Zealand Meat Producers Board

See Page 10 Elaboration added to this Statement

¹The term "foreign principal" includes, in addition to those defined in section 1(b) of the Act, an individual or organization any of whose activities are directly or indirectly supervised, directed, controlled, financed, or subsidized in whole or in major part by a foreign government, foreign political party, foreign organization or foreign individual. (See Rule 100(a)(9)).

A registrant who represents more than one foreign principal is required to list in the statements he files under the Act only those foreign principals for whom he is not entitled to claim exemption under Section 3 of the Act. (See Rule 208.)

12. During this 6 month reporting period, have you on behalf of any foreign principal engaged in political activity² as defined below?
Yes ☐ No ☒

If yes, identify each such foreign principal and describe in full detail all such political activity, indicating, among other things, the relations, interests and policies sought to be influenced and the means employed to achieve this purpose. If the registrant arranged, sponsored or delivered speeches, lectures or radio and TV broadcasts, give details as to dates, places of delivery, names of speakers and subject matter.

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13. In addition to the above described activities, if any, have you engaged in activity on your own behalf which benefits any or all of your foreign principals? Yes ☐ No ☒

If yes, describe fully.

²The term "political activities" means the dissemination of political propaganda and any other activity which the person engaging therein believes will, or which he intends to, prevail upon, indoctrinate, convert, induce, persuade, or in any other way influence any agency or official of the Government of the United States or any section of the public within the United States with reference to formulating, adopting, or changing the domestic or foreign policies of the United States or with reference to the political or public interests, policies, or relations of a government of a foreign country or a foreign political party.

IV—FINANCIAL INFORMATION

14. (a) RECEIPTS—MONIES

During this 6 month reporting period, have you received from any foreign principal named in Items 8, 9 and 10 of this statement, or from any other source, for or in the interests of any such foreign principal, any contributions, income or money either as compensation or otherwise? Yes ☒ No ☐

If yes, set forth below in the required detail and separately for each foreign principal an account of such monies.³

<i>Date</i>	<i>From Whom</i>	<i>Purpose</i>	<i>Amount</i>
<i>See Page 11 addition to this statement for elaboration</i>			

Total

(b) RECEIPTS—THINGS OF VALUE

During this 6 month reporting period, have you received any thing of value⁴ other than money from any foreign principal named in Items 8, 9 and 10 of this statement, or from any other source, for or in the interests of any such foreign principal? Yes ☐ No ☒

If yes, furnish the following information:

<i>Name of foreign principal</i>	<i>Date received</i>	<i>Description of thing of value</i>	<i>Purpose</i>
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³A registrant is required to file an Exhibit D if he collects or receives contributions, loans, money, or other things of value for a foreign principal, as part of a fund raising campaign. See Rule 201(c).

⁴Things of value include but are not limited to gifts, interest free loans, expense free travel, favored stock purchases, exclusive rights, favored treatment over competitors, "kickbacks," and the like.

15. (a) DISBURSEMENTS—MONIES

During this 6 month reporting period, have you

(1) disbursed or expended monies in connection with activity on behalf of any foreign principal named in Items 8, 9 and 10 of this statement? Yes ☒ No ☐

(2) transmitted monies to any such foreign principal? Yes ☐ No ☒

If yes, set forth below in the required detail and separately for each foreign principal an account of such monies, including monies transmitted, if any, to each foreign principal.

*Date**To Whom**Purpose**Amount*

See Page 12 Elaboration added to this Statement

 Total

15. (b) **DISBURSEMENTS—THINGS OF VALUE**

During this 6 month reporting period, have you disposed of anything of value⁵ other than money in furtherance of or in connection with activities on behalf of any foreign principal named in items 8, 9 and 10 of this statement?

Yes ☐ No ☒

If yes, furnish the following information:

<i>Date disposed</i>	<i>Name of person to whom given</i>	<i>On behalf of what foreign principal</i>	<i>Description of thing of value</i>	<i>Purpose</i>
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(c) **DISBURSEMENTS—POLITICAL CONTRIBUTIONS**

During this 6 month reporting period, have you from your own funds and on your own behalf either directly or through any other person, made any contributions of money or other things of value⁵ in connection with an election to any political office, or in connection with any primary election, convention, or caucus held to select candidates for political office?

Yes ☐ No ☒

If yes, furnish the following information:

<i>Date</i>	<i>Amount or thing of value</i>	<i>Name of political organization</i>	<i>Name of candidate</i>
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V—POLITICAL PROPAGANDA

(Section 1(j) of the Act defines "political propaganda" as including any oral, visual, graphic, written, pictorial, or other communication or expression by any person (1) which is reasonably adapted to, or which the person disseminating the same believes will, or which he intends to, prevail upon, indoctrinate, convert, induce, or in any other way influence a recipient or any section of the public within the United States with reference to the political or public interests, policies, or relations of a government of a foreign country or a foreign political party or with reference to the foreign policies of the United States or promote in the United States racial, religious, or social dissensions, or (2) which advocates, advises, instigates, or promotes any racial, social, political, or religious disorder, civil riot, or other conflict involving the use of force or violence in any other American republic or the overthrow of any government or political subdivision of any other American republic by any means involving the use of force or violence.)

16. During this 6 month reporting period, did you prepare, disseminate or cause to be disseminated any political propaganda as defined above? Yes ☐ No ☒

IF YES, RESPOND TO THE REMAINING ITEMS IN THIS SECTION V.

17. Identify each such foreign principal.

⁵Things of value include but are not limited to gifts, interest free loans, expense free travel, favored stock purchases, exclusive rights, favored treatment over competitors, "kickbacks," and the like.

18. During this 6 month reporting period, has any foreign principal established a budget or allocated a specified sum of money to finance your activities in preparing or disseminating political propaganda? Yes ☐ No ☐

If yes, identify each such foreign principal, specify amount, and indicate for what period of time.

NA

19. During this 6 month reporting period, did your activities in preparing, disseminating or causing the dissemination of political propaganda include the use of any of the following:

- ☐ Radio or TV broadcasts ☐ Magazine or newspaper articles ☐ Motion picture films ☐ Letters or telegrams
☐ Advertising campaigns ☐ Press releases ☐ Pamphlets or other publications ☐ Lectures or speeches

☐ Other (specify) _____

NA

20. During this 6 month reporting period, did you disseminate or cause to be disseminated political propaganda among any of the following groups:

- ☐ Public Officials ☐ Newspapers ☐ Libraries
☐ Legislators ☐ Editors ☐ Educational institutions
☐ Government agencies ☐ Civic groups or associations ☐ Nationality groups
☐ Other (specify) _____

NA

21. What language was used in this political propaganda:

☐ English

☐ Other (specify) _____

NA

22. Did you file with the Registration Section, U.S. Department of Justice, two copies of each item of political propaganda material disseminated or caused to be disseminated during this 6 month reporting period? Yes ☐ No ☐

NA

23. Did you label each item of such political propaganda material with the statement required by Section 4(b) of the Act?

Yes ☐ No ☐

NA

24. Did you file with the Registration Section, U.S. Department of Justice, a Dissemination Report for each item of such political propaganda material as required by Rule 401 under the Act? Yes ☐ No ☐

NA

VI—EXHIBITS AND ATTACHMENTS

25. EXHIBITS A AND B

- (a) Have you filed for each of the newly acquired foreign principals in Item 9 the following:

Exhibit A⁶ Yes ☐ No ☐
 Exhibit B⁷ Yes ☐ No ☐

If no, please attach the required exhibit.

NA

- (b) Have there been any changes in the Exhibits A and B previously filed for any foreign principal whom you represented during this six month period? Yes ☐ No ☐

If yes, have you filed an amendment to these exhibits?

Yes ☐

No ☐

If no, please attach the required amendment.

⁶The Exhibit A, which is filed on Form CRM-157 (Formerly OBD-67) sets forth the information required to be disclosed concerning each foreign principal.

⁷The Exhibit B, which is filed on Form CRM-155 (Formerly OBD-65) sets forth the information concerning the agreement or understanding between the registrant and the foreign principal.

26. EXHIBIT C

If you have previously filed an Exhibit C⁸, state whether any changes therein have occurred during this 6 month reporting period. Yes ☐ No ☐

If yes, have you filed an amendment to the Exhibit C? Yes ☐ No ☐

If no, please attach the required amendment.

NA

27. SHORT FORM REGISTRATION STATEMENT

Have short form registration statements been filed by all of the persons named in Items 5 and 7 of the supplemental statement? Yes ☐ No ☐

If no, list names of persons who have not filed the required statement.

NA

The undersigned swear(s) or affirm(s) that he has (they have) read the information set forth in this registration statement and the attached exhibits and that he is (they are) familiar with the contents thereof and that such contents are in their entirety true and accurate to the best of his (their) knowledge and belief, except that the undersigned make(s) no representation as to the truth or accuracy of the information contained in attached Short Form Registration Statement, if any, insofar as such information is not within his (their) personal knowledge.

(Type or print name under each signature)

(Both copies of this statement shall be signed and sworn to before a notary public or other person authorized to administer oaths by the agent, if the registrant is an individual, or by a majority of those partners, officers, directors or persons performing similar functions who are in the United States, if the registrant is an organization.)

L.I. Bryant
L.I. BRYANT

Subscribed and sworn to before me at Arlington, Virginia

this 5th day of August, 19 93

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SECTION
REGISTRATION UNIT

Joseph C. Lunny
(Signature of notary or other officer)

My Commission Expires 1-1-97

⁸The Exhibit C, for which no printed form is provided, consists of a true copy of the charter, articles of incorporation, association, constitution, and bylaws of a registrant in an organization. (A waiver of the requirement to file an Exhibit C may be obtained for good cause upon written application to the Assistant Attorney General, Criminal Division, Internal Security Section, U.S. Department of Justice, Washington, D.C. 20530.)

UNITED STATES DEPARTMENT OF JUSTICE
REGISTRATION UNIT
CRIMINAL DIVISION
WASHINGTON, D.C. 20530

NOTICE

Please answer the following questions and return this sheet in triplicate with your supplemental statement:

1. Is your answer to Item 16 of Section V (Political Propaganda - page 7 of Form CRM-154, formerly Form OBD-64-- Supplemental Statement):

Yes _____ or No _____

(If your answer to question 1 is "yes" do not answer question 2 of this form.)

2. Do you disseminate any material in connection with your registration:

Yes _____ or No _____

(If your answer to question 2 is "yes" please forward for our review copies of all such material including: films, film catalogs, posters, brochures, press releases, etc. which you have disseminated during the past six months.)

L. I. Bryant
Signature

Aug 5, 1993
Date

L. I. BRYANT
Please type or print name of signatory on the line above

Director Trade Policy
Title

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SECTION
REGISTRATION UNIT

ATTACHMENT IN ELABORATION OF ITEM 11

THE NEW ZEALAND MEAT PRODUCERS BOARD IS A STATUTORY BOARD OF NEW ZEALAND, WITH A REPRESENTATIVE IN WASHINGTON. IT IS A BOARD REPRESENTING THE MEAT FARMERS OF NEW ZEALAND. I, THE UNDERSIGNED, HAVE BEEN TEMPORARILY SECONDED TO ARLINGTON VA OFFICE TO MANAGE ITS AFFAIRS.

PRIMARY FUNCTIONS ARE AS FOLLOWS:

(A) TO OBSERVE, MONITOR AND REPORT ON THE MEAT MARKET IN NORTH AMERICA. THIS FUNCTION BEING PARTICULARLY RELATED TO IMPORTS OF NEW ZEALAND MEAT INTO THE USA AND CANADA.

VARIOUS MEETINGS WITH WASHINGTON ATTORNEY TO DISCUSS IMPLICATIONS OF MEAT IMPORT LAW, LAMB COUNTERVAILING DUTY. CANADIAN TARIFF NZ IMPORTS

(B) TO ASSIST TRADE INQUIRIES FOR NEW ZEALAND MEAT.

RESPONDED TO CALLERS SEEKING INFORMATION ON NEW ZEALAND MEAT

(C) TO LIAISE WITH THE NEW ZEALAND EMBASSY, CONSULATES, AND TRADE COMMISSIONERS, AND OUR ATTORNEY ON ANY DEVELOPMENTS THAT MIGHT AFFECT NEW ZEALAND MEAT.

KEPT INFORMED ON DEVELOPMENTS CONCERNING GATT, NAFTA, LABELLING/NUTRITION, MIL, CANADIAN TARIFF ON NZ BEEF IMPORTS

(D) TO ASSIST TRADE AND FARMING VISITORS FROM NEW ZEALAND.
ACCOMPANIED NZ FARMING REPRESENTATIVES ON WEST COAST

(E) TO LIAISE WITH FARMER BODIES IN THE USA AND CANADA, SUCH AS CATTLE AND SHEEP FARMER ORGANISATIONS; AND ALSO MEAT TRADE ASSOCIATIONS.

ATTENDED CONVENTIONS/MEETINGS WITH AMI, MICA, ASI, NCA, NLS&MB, CANADIAN SHEEP FEDERATION, CANADIAN MEAT IMPORTERS, WSMA

(F) TO PROMOTE THE NEW ZEALAND MEAT INDUSTRY

PLACED ADVERTISEMENTS IN PROCESSING/RESTAURANT RELATED MAGAZINES.
DISTRIBUTED A NEWSLETTER PROMOTING NEW ZEALAND MEAT.
SPONSORED LUNCHEONS AT ACF REGIONAL CONVENTIONS
DISTRIBUTED NZ LAMB COOKBOOK TO CHEFS/ACF MEMBERS

LAURIE BRYANT

REGISTRATION NUMBER: 2526
SUPPLEMENTAL STATEMENT IN ELABORATION OF ITEM 14A
PERIOD ENDING JULY 8 1993

PAGE 11

RECEIPTS MONTH	FROM WHOM / REIMBURSEMENT/PURPOSE	\$ AMOUNT
JANUARY	ANN MCLEAN/REIMBURSE	328.53
	MUIRHEAD/REIMBURSEMENT	15.92
	L BRYANT/BEEF CATTLE BD REIMB	749.61
	ASI/CONVENTION DUPLICATE REGIS	125.00
	PILOT TRADING - REIMBURSEMENT	6,433.50
	HARTFORD/AUTO INS-DAMAGE	5,245.69
	M MUIRHEAD-AUTO RPR REIMBURSEMENT	297.63
FEBRUARY	NZ REMITTANCE	75,000.00
	HARTFORD INSURANCE AUTO PAYMENT	5,537.31
	M. MUIRHEAD REIMBURSEMENT	19.42
	VA POWER (PRG)	97.84
	L. BRYANT REIMBURSEMENT	54.70
	M MUIRHEAD-LAMB REIMBURSE	84.59
	EMBASSY SOCIAL CLUB-LA REBU	242.25
	COUNTY OF FAIRFAX	161.08
	PILOT TRADING	3,677.45
MARCH	NZ MARCH REMITTANCE	75,000.00
	CATTLEMENS BEEF PROMO & RSH BD REIM	1,170.70
	M. MUIRHEAD-PHONE REIMBURSEMENT	15.42
	ITT HARTFORD-AUTO INS REIMBURSMENT	53.00
	PEAK MGMT - REIMBURSEMENT(LIB)	1,426.65
APRIL	NZ REMITTANCE	75,000.00
	AMI-REIMBURSEMENT CANCELLED SHOW	8,400.00
	M. MUIRHEAD-REIMBURSEMENT PHONE	68.94
MAY	NZ MAY REMITTANCE	75,000.00
	MJM TRAVEL REIMBURSEMENT	167.84
	MJM PHONE REIMBURSEMENT	15.92
	LIB CABLE REIMBURSEMENT	23.85
	CATTLEMENS BEEF PROMO BOARD	2,050.08
JUNE	NZ JUNE REMITTANCE	75,000.00
	OLIVER CARR-RENT CREDIT	131.03
	M. MUIRHEAD-PHONE REIMBURSEMENT	19.42
	TRAVEL REIMBURSEMENT	39.34
	L. BRYANT-CABLE REIMBURSEMENT	33.70
	TOTAL	411,686.41

SUPPLEMENTAL STATEMENT IN ELABORATION OF ITEM 15A

6 MONTH PERIOD ENDING JULY 8 1993

EXPENSES

PERSONNEL	\$ 188,033
COMMUNICATIONS (TELE, TELEX FAX, POSTAGE COPYING, OFFICE SUPPLIES, PRINTING, SUBSCRIPTIONS, MEMBERSHIPS, PUBLICATIONS, (TRAVEL \$37,201)	49,067
MOTOR VEHICLE	3,047
PROPERTY (OFFICE)	24,186
FEES - BRONZ & FARRELL WASH DC	37,865
PROMOTION (S LAIRD JENKINS CORP-ARL VA)	111,863
CAPITAL EXPENSE REPLACEMENT AUTO	16,073
ENTERTAINMENT	6,154
TOTAL	\$ 436,288

TRAVEL
LAURIE BRYANT

JANUARY	DENVER CHICAGO TORONTO OTTAWA	NATIONAL CATTLEMENS ASSOCIATION MEETINGS NATIONAL LIVESTOCK & MEAT BOARD MEETINGS INDUSTRY MEETINGS MEETINGS WITH GOVERNMENT OFFICIALS
FEBRUARY	DALLAS FT WORTH	BEEF BOARD MEETING
MARCH	OTTAWA - RENO SEATTLE	CANADIAN CATTLEMENS ASSOCIATION AGM WESTERN STATES MEAT ASSOCIATION CONVENTION MEETING WITH ASI EXECUTIVE
APRIL	TORONTO DENVER	MEETING WITH AMIC EXECUTIVE BEEF BOARD MEETING
MAY/JUNE	DALLAS/ FT WORTH OTTAWA NEW ZEALAND MEXICO CITY TORONTO MONTERREY	BEEF BOARD MEETING CITT INQUIRY MANAGEMENT MEETINGS PROMOTION CMIC AGM PROMOTION

MICHAEL MUIRHEAD

JANUARY	COLUM OHIO	INDUSTRY VISIT - WENDY'S
FEBRUARY	CHICAGO	AMI MEETING
MARCH	RENO S.FRAN NEW ZEALAND	WESTERN STATES MEAT ASSOCIATION CONVENTION /WITH WIFE AMERICAN CULINARY FEDERATION CONVENTION & TRADE VISITS COMPASSIONATE TRAVEL FOR WIFE
APRIL	BOSTON/ NEW YORK	TRADE VISITS
MAY	LA/OAKLAND/ SAN FRAN MEXICO CITY	ACCOMPANY NZ VISITORS ON INDUSTRY VISITS MAKE ARRANGEMENTS FOR JUNE PROMOTION/SEMINAR
JUNE	ATLANTA MEXICO CITY/ MANZANILLO/ MONTERREY DALLAS/FT W ATLANTA	INDUSTRY VISIT PROMOTION-EDUCATION SEMINARS MEETING WITH ASI MEETING WITH ARCOP

TOTAL \$37,201

NEW ZEALAND

B · E · E · F



LEAN BEEF, RICH REWARDS.



Satisfy your customers' demands for leaner beef formulations easily, profitably with lean New Zealand beef. Range-fed New Zealand beef is guaranteed to meet manufacturer's specified leanness within 1/2% — whether you order New Zealand cow meat up to 93% lean ... or our large supply of young bull meat up to 97% lean.

New Zealand is also your best source for lean primal cuts made from top quality steers fed a high protein diet of clover and meadow grass. Available



refrigerated or frozen — consistently sized for even cooking and less waste. And all New Zealand beef is raised in a clean environment, with consistency and quality assured by advanced stock management, modern processing technology, rigid quality inspection and state-of-the-art packaging. Enrich your business with



New Zealand beef — reliably lean, dependably delicious! For more information, call the New Zealand Meat Producers Board, (703) 243-1295.

Reliably lean, dependably delicious.


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NEW ZEALAND



B · E · E · F



WE SPEAK YOUR LANGUAGE

\$pec•tacular. New Zealand may be half a world away, but when it comes to understanding—and meeting—your specifications and standards, we stand with you like nobody else on earth.  So whether you're a processor looking for lean meat for grinding or a foodservice buyer looking for tasty primal cuts, you can count on New Zealand beef to run true to specs. In fact, New Zealand beef CL ratings are so dependable, you can bank on a tolerance of less than ½%. And you'll find our primal cuts consistently sized, time after time. No waste. No re-works.



 **Healthy profits.** One reason our beef tastes so good is that our little country of New Zealand sets international standards for beef stock care, hygiene, processing, and packaging. The meat we produce is quality meat you can trust and your customers can enjoy.  When you're looking the world over for quality beef, look to New Zealand beef. For more information, call the New Zealand Meat Producers Board, (703) 243-1295.



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SUMMER 1993

NEW ZEALAND MEAT

NEW
ZEALAND
MEAT
PRODUCERS
BOARD

MESSAGE FROM THE DIRECTORS

U.S. MEAT IMPORT LAW

In this issue, we have devoted most of the space to the important and topical issue of the "U.S. Meat Import Law" and the reasons why this archaic law should be removed from the books.

We have no apologies to make for our concentration on this issue which affects our beef producers and industry and also affects a wide spectrum of U.S. industry and consumers.

"the law hurts us at home, and doesn't help us overseas" —Dan Murphy

The law is an archaic and artificial legislative mechanism which severely distorts the prices of



Michael Muirhead

New Zealand beef in this market and world wide. The law increases the cost of raw material to U.S. processors, raises the cost of finished goods to consumers, creates severe price competition for U.S. beef exporters in the growing Asian markets, reduces employment and earning opportunities at the nations' ports, has a negative effect on downstream infrastructure in the transport, warehouse and customs agency businesses and impacts on the airline industry with reduced air-freight imports of fresh beef.

"the key to a level playing field is equal access." —Stephen Wolf

A study by the Sparks Company Inc., an agriculture information and consulting firm, indicates that in 1991, the MIL cost the U.S. domestic economy \$266 million; an earlier ITC report quoted by the editor of Meat and Poultry magazine puts the cost of the law in economic disruption to U.S. processors at \$132 million — huge ransoms for no apparent benefit to the economy. The long suffering consumer again pays through the nose.

"clearly, US processors have good reason to oppose blatant protectionist policies" —Dan Murphy

The law in reality has no positive effects on the domestic cattle producing industry and it can be argued that, even from their perspective, the real effects of this flawed legislation are negative.



Laurie Bryant

The domestic industry is basically geared towards producing fed beef. Imports of lower-priced very lean manufacturing beef create a market for domestic fat trimmings — a by-product of the fed beef industry which otherwise would have a limited market and could end up as rendering material. Without imports the market complex has insufficient supplies of "high lean" manufacturing beef.

continued on page 4

NEW ZEALAND MEAT PRODUCERS BOARD

1110 N. Glebe Rd. Suite 580
Arlington, VA 22201

Bulk Rate
U.S. Postage
PAID
Permit No. 293
Merrifield, VA

US PROCESSORS MAY LOSE OUT

Hamburger-loving President Bill Clinton may be amongst those American consumers who feel the impact of beef import restrictions under the Meat Import Law later this year.

As at April 30, New Zealand had already exported 50 percent of its 192,000 tonne allocation for the whole calendar year, while Australia had exported 44.6 percent of its quota of 315,200 tonnes. This raises the distinct possi-

bility of supply difficulties later in the year. New Zealand imports to the US were up by 4.5 percent on the same period last year, and Australian imports up by a third.

US meat processors who are regular customers for New Zealand and Australian beef are already becoming concerned that the restrictions may disrupt their supplies, according to Phillip Schulz, director of purchasing for Arcop, Inc., which is famous for its Arby's roast beef sand-

wiches. He and Tom Peehn, the fresh meat coordinator for one of his major suppliers, Peck Foods, were recently in New Zealand to discuss supply with a range of beef exporters.

The Arcop operation uses quantities of frozen 100 percent visual lean beef, which it prefers to source from New Zealand and Australia "which have the cleanest beef in the world." Arcop is a customer for "red beef", selected primals, rather than manufacturing grade beef. Exporters in New

Zealand and in Australia have told them this is the type of beef, for which there are buyers elsewhere, which they are having to divert away from the US market while quantities are restricted.

Processors worried that they will not be able to get the beef they prefer, plan a meeting next month to point out the problems the Meat Import Law is causing within the US, Phillip Schulz said.

BEEF DIVERSIFICATION - TO MARKETS OTHER THAN THE USA

US importers have been commenting for some time of a reduction in the availability of offers of beef from New Zealand and have asked why.

The reason is forced requirement to sell a percentage of production outside of the US. Our industry would dearly love to sell the traditional 75% of production to the US at US

prices instead of having to divert 40%-45% to other less attractive markets. The diversification percentage is what we have identified as necessary to market elsewhere. Entries to

the US to mid May indicate that 53% of our restraint level has already been entered. The amounts entered in 1991 and 1992 were 36% and 32% respectively.

Destination of Shipments-Oct/March 1991/2 and 1992/3

(tonnes shipping weight)

	1991/2	% of Shipments	*1992/3	% of Shipments
USA	107376	77.6	107754	72.2
Canada	6866	5.0	17993	12.1
ROK	7348	5.3	3675	2.5
Taiwan	3051	2.2	3556	2.3
Okinawa	1339	1.0	1213	0.9
Japan	2017	1.5	3803	2.6
Pacific	3603	2.6	3790	2.5
Mexico	1654	1.2	998	0.6
Other	5043	3.6	6426	4.3
Total	138297	100.00	*149208	100.00

*Provisional.

VRA Quantities and US Imports

	1993	1992	1991
Australia	315202	340578	337157
*New Zealand	192777	206634	210099
Other	63140	52961	65310
Total	571119	600173	603566

*Down 4.84% on '92 and 5.38% on '91 imports.

Beef Slaughter. Head. (to end March)

	1993	1992	1991
Steer	341913	342427	343017
Heifer	97851	87797	76416
Cow	372052	373236	401480
Bull	410967	338210	317421

Compared with last year the major variances are:

Steer down	0.2%
Heifers up	11.5%
Cow down	0.3%
Bull up	21.5%
Total up	7.1%

Anticipated slaughter is expected to reach 2 million head with production increasing by 10-11%.

Exports to Canada are expected to increase to above

last year's historically low figure of 19000 tonnes.

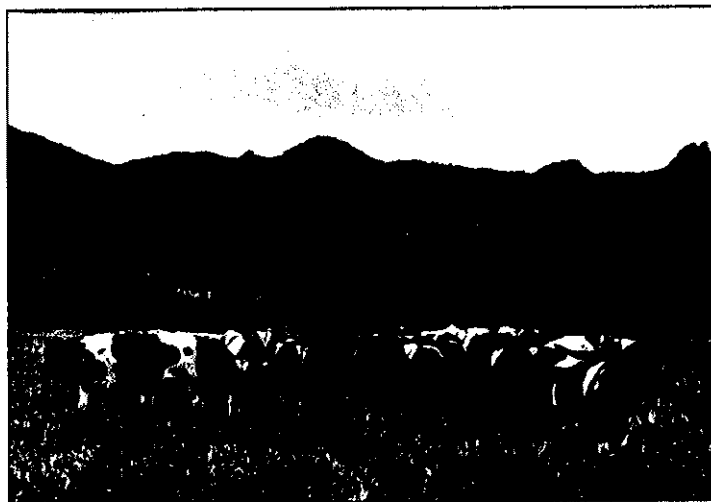
Exports to Mexico are forecast to substantially increase above last year's tonnage.

BEEF SLAUGHTER NUMBERS

After a slow start to the beef slaughter season (the New Zealand season is from 1 October until 30 September) processing plants are now generally operating at capacity with slaughter to date 7.1% ahead of the same time last year. This compares to an 8% decline in comparative slaughter numbers as at mid January.

Total beef production for the year is still forecast for an 11% increase compared to last year but due to artificial quan-

titative restrictions that have been imposed preventing unrestricted entry to this market, the estimated 21,000 tonnes of additional production will not find its way to the U.S. - in fact our allocation is 14,000 tonnes less than what we were able to enter in 1992. The carry over or bonded quantity that has already been entered in January, of 14,000 tonnes, further reduces the amount of beef able to be entered into commerce for the remainder of this year.



UNIVERSITY NEWS/ ANIMAL WELFARE

The first chair in Animal Welfare Science in the Southern Hemisphere has been established at Massey University. In a further demonstration of a commitment to animal welfare and leadership in this area, New Zealand has joined forces with the Australian Council for the

Care of Animals in Research and Training.

New Zealand has long been recognized as a world leader in humane slaughter research, technology and the application of developments to a commercial conclusion. A number of overseas plants are now utilizing New Zealand developed technology.

AFFCO PLANS

AFFCO the giant beef processing company, by New Zealand standards, has announced plans for a major rebuild of its Moerewa (in the North of New Zealand) plant. The new plant, designed by the team responsible for the recently commissioned state-of-the-art Manawatu Beef

Packers plant in Feilding, will incorporate a number of similar high-tech features which will provide enhanced quality, improved hygienic purity and increased efficiencies.



RAISING THE LOWE FAMILY PROFILE

Two members of the Lowe family are now competitors in the New Zealand beef industry.

Graeme Lowe (Lowe Walker), one of the meat industry's longest established identities, is to build a new processing plant in the North of New Zealand.

The new plant will be modeled on the small-size high output plants already operated by Lowe Walker at Paeroa and Te Aroha.

Lowe Walker is a private

company which last year was New Zealand's sixth ranked meat exporter with f.o.b. sales valued at \$300 million. Lowe Walker also operates a high capacity plant at Hawera and in 1991 acquired the former New Zealand Beef Packers plant in Hastings.

The main focus for Lowe Walker is beef, with an 18.2% share of the North Island market last year.

The new plant to be built should be in operation in June and with the planned through-

put of 200 head a day, should boost the company's throughput to 350,000 head.

Meanwhile, Andrew Lowe, once a director and general manager for his father's company, has opened a new \$3.4 million beef processing plant. Hill Country Beef plans to process 140 cattle a day in a 7-day operation. Andy Lowe says that the company will market most of its own beef, focusing at first on North and South Asia. It is expected that manufacturing beef from this plant

will be available for the U.S. market.

Hill Country Beef is a completely separate operation to Lowe Walker and according to Graeme Lowe will be in competition with Lowe Walker for livestock and markets.



MESSAGE FROM THE DIRECTORS

U.S. MEAT IMPORT LAW

continued from page 1

Reverting to using higher priced cuts from fed cattle would substantially increase raw material costs.

"protectionist initiatives in the United States must be resisted" —Stephen Wolf

In 1964 when the MIL legislation was enacted, U.S. beef exports were virtually nil — in 1993, U.S. exports are expected to represent almost 6.5% of domestic production. When exports are deducted from the import quantity, net imports amount to only 1 billion pounds — the lowest figure since 1965. Over this same period, the population has increased by 31.6% to 234.7 million.

Currently, export receipts for US beef exceed the cost of beef imports by \$163 million.

Quantitative import restrictions applying to beef in this market result in price distortions and increased competition for US exports in other areas.

The dog is now biting the hand that feeds it!

The issue of the MIL and quotas is not of Honda or Toyota magnitude — imports of New Zealand and Australian beef total less than 8% of U.S. production.

The excuse for discriminating against subsidized production and below cost exports cannot be applied against New Zealand and Australia, the only victims of the MIL. Both nations practice subsidy free agricultural economies. Tax payers in these countries do not contribute a penny to their respective beef industries — no tax breaks, no export enhancement programs, no below market finance deals, no government funds for promotion, no

subsidized grass, no attractive set-aside programs or below market rental of federal land, no fertilizer subsidies and no sweetheart freight arrangements. In both countries the industry is commercially orientated and market dependent from conception to consumption.

When is the posturing to stop? Repealing the MIL would be a positive and painless action which would support the publicly espoused anti-protectionist philosophies embraced by both the Bush and Clinton camps. Removal of the Meat Import Law would demonstrate to the international community America's commitment to unsubsidized production, free market access and the expansion of global trade.

With permission from the authors, Stephen M. Wolf, Chairman of United Airlines and Dan Murphy, Editor of the "National Provisioner" we include editorial excerpts recently published in "National Provisioner" magazine and in United Airlines' "Hemispheres." These modern and visionary authors, opinion shapers and leaders of commerce are pointing the way to an "anti-protectionist and free trading" society which will maximize efficiencies and increase consumer spending.

These initiatives deserve your support. The challenge is to remove the Meat Import Law and dispense with impediments created by artificial tariff and non tariff barriers to trade.

"ultimately, free trade is the only avenue to fairness and is the best way to ensure the consumer benefits from real competition" —Stephen Wolf

CANADIAN MINISTERIAL CONFERENCE ON COMPETITIVENESS

Laurie Bryant, Director Trade Policy in the New Zealand Meat Producers Board Washington office, was invited by Agriculture Canada to give a paper to the above conference on the recent transformation that has taken place in the New Zealand meat industry.

There was considerable interest expressed by conference participants in the changes in New Zealand economic policy outlined in the paper. Changes which, over a period of less than 10 years, transformed New Zealand from one of the most regulated countries in the western world to one of the least regulated. In the process of that transformation, industries have become much more competitive internationally as they emerged from behind highly protective barriers. One of those affected was the meat industry.

The major economic reform process began in 1984. The first step was to devalue the currency preparatory to floating it in March the following year. Then followed a number of policy measures over the next seven years including the following abbreviated list:

— Removal of assistance to agriculture

- Removal of export assistance
- Lower import protection
- Change in the taxation system
- Privatization of government trading activities.
- Deregulation of the domestic economy.
- A tight monetary policy to control inflation.
- Reduction in welfare payments
- Labor market reform

The paper discussed the effects of these policy changes on agriculture, one of the first sectors to be exposed to the reality of the world market when subsidies on product prices and inputs were removed. It then examined the more specific impact on the New Zealand meat industry — how it adjusted to this new environment, and its subsequent emergence as a much more diversified and efficient industry today.

Finally the paper pointed out that future prosperity of the New Zealand meat industry now depends on developments in the international trading environment. Unfortunately protectionism is alive and well and is seriously undermining the ability of the industry to achieve improved market returns. A satisfactory outcome to the GATT round is critical to resolving this problem.

New Zealand Meat Producers Board

The Board's prime role is to assist in the development of export meat markets and to maximize returns to the producers and New Zealand. An office is maintained in the Washington D.C. metro area which assists the trade with information about the New Zealand meat industry.

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Publications available at no charge are:

- New Zealand Meat Trade Guide
- Importer/Exporter Lists
- New Zealand Meat Guide to Carcass Classification
- "Meat New Zealand" Newsletter